NFC
Procedures

National Finance Center
Office of the Chief Financial Officer
U.S. Department of Agriculture

July 1994

Retirement Processing System (RETM)

PC Products

Optical Storage

CD-ROM

User Documentation For Systems And Processes

PC Products

TITLE I
Payroll/Personnel Manual

CHAPTER 9
Retirement Procedures

SECTION 2
Retirement Processing System (RETM)

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About This Procedure

This procedure provides instructions for accessing and operating the Retirement Processing System (RETM). The following information will help you to use the procedure more effectively and to locate further assistance if needed.

How This Procedure Is Organized

The primary sections of this procedure are described below:

System Overview describes what the system is used for and provides related background information.

System Access provides access security information and instructions for accessing the system.

Operating Features describes the system's design and how to use its operating features.

Instructions for using the **Main Menu** and **Options** are provided separately depending on your access level. All functions within an option are covered before going to the next option on the main menu. The menu and option screens are presented as figures within the text.

Exhibits include illustrations such as examples of reports, edit messages, and help screen.

Pages are numbered consecutively at the bottom of each page. If the procedure is amended, point pages (e.g., 6.1, 6.2, etc.) are used, as needed, to accommodate additional pages. All amended pages are marked at the bottom with the amendment number and date. If you begin receiving this procedure after it has been amended, you will receive the publication with all amendments and bulletins. For amendments, remove and insert pages according to the attached Page Control Chart so that your procedure is current.

What Conventions Are Used

This procedure uses the following conventions:

□ Messages displayed by the system are printed in *italics*. Example: The message *Retirement Tracking Record Stored* is displayed.

□ Field specifications are also printed in italics. Example: **SSNO** *(required, numeric; 9 positions)*. Key in the employee's social security number.

□ Data that is system generated or that you must key in exactly as shown is printed in ***bold italics***. Example: Key in ***U***.

□ Emphasized text within a paragraph is printed in **bold**. Example: Add pertinent data into RETM **before** sending the package to NFC.

□ Figure references printed in bold link the figures with the text. Example: The CSRS/FERS Forms Inquiry screen (**Figure 7**) is displayed.

□ For all RETM screens, the fields displaying zeros (0) are numeric. Example: SSNO: 000000000.

□ Keyboard references are printed in brackets. Example: Press [Enter]. Press [PF2].

□ Important extra information is identified as a note. Example: **Note:** Fields displaying zeros (0) are numeric.

□ Optional actions at the end of a processing function are preceded by bullets. Example:

  • To view additional records for the same employee, press [PF8].

Who To Contact For Help

For questions about this procedure, contact the Directives and Analysis Branch at **504–255–5322**.

For questions about the system (including help with unusual conditions or obtaining access authority), contact Information Center personnel at **504–255–5230**.

For questions about processing retirement documents contact the Payroll/Personnel Operations Section at **504–255–4729**.

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System Overview

The Retirement Processing System (RETM) external procedure provides instructions for agency personnel offices to track the processing of applications for retirement benefits in the event of an employee's (1) retirement, (2) death, or (3) separation with a request for a refund of retirement contributions. RETM is an online data processing system of the U.S. Department of Agriculture.

RETM provides personnel offices with the capability of adding, modifying, reporting, querying a RETM tracking record, and printing a paper version of the Individual Retirement Record, SF–2806 (CSRS)/SF–3100 (FERS). **Note:** The Individual Retirement Record can be generated for employees at any time during employment.

Agency personnel offices accept employees' applications. These applications along with other related documents (e.g., health and life insurance) are reviewed by the agency personnel offices. (See Title I, Payroll/Personnel Manual, Chapter 9, Section 1, Processing Retirement Documents.) It is essential that personnel offices enter retirement actions in the Payroll/Personnel System as soon as they are received to allow time for processing. The agency personnel offices then enter pertinent data into RETM to track the employee's application before sending the retirement package to NFC.

NFC processes these applications and submits them, along with the official SF–2806/SF–3100, to the Office of Personnel Management (OPM) within 30 days of the employee's separation date. Therefore, it is essential for agencies to submit the retirement package as soon as possible to meet the required timeframe mandated by OPM. If actions are entered in the system late, processing is delayed.

NFC personnel review the applications and related documents to ensure that they are properly completed. Additional data needed to track the processing of the application is also entered into RETM by NFC personnel, which updates the RETM records.

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System Access

The following paragraphs provide information about accessing RETM, including remote terminal usage, sign-on, and sign-off instructions.

Remote Terminal Usage And Security

For specific information about security for systems access, individual user identification and password, use of master control and directional keys, see Title VI, Systems Access Manual, Chapter 2, Remote Site Usage, Section 1, Remote Terminal Usage. For information about connecting to and disconnecting from your telecommunications network, see the instructions that are provided with your specific network.

Sign-On

Once you are connected to your telecommunications network, the NFC banner screen (**Figure 1**) is displayed.

Respond to the prompts as follows:

1. **Enter User ID** *(required, alphanumeric field; 5 positions)* Key in your user ID (e.g., NF999).

2. **Password** *(required, alphanumeric field; 6 to 8 positions).* Key in your password (your user password is not displayed on the screen).

3. **New Password** *(optional, alphanumeric field; 6 to 8 positions).* This field is used when your current password has expired and the system requests a new password. However, you may change your password at any time (but not more than once daily) by keying in a new password.

4. **Enter Application Name** *(required, alphanumeric field; 4 positions).* Key in **RETM** and press [Enter]. The Agency Tracking Menu is displayed, except when NFC needs to communicate special system function messages. In this case, the Electronic Access Bulletin Board is displayed. Read the message(s) shown and press [Enter]. The NFC Menu (**Figure 2**) is displayed. Press [Enter] again to display the Agency Tracking Menu.

Note: You may also select Option 8, Directives Bulletin Board, on the NFC Menu, to view additional payroll/personnel related messages. (See Title VI, Systems Access Manual, Bulletin 94–1, Directives Bulletin Board, dated January 24, 1994.)
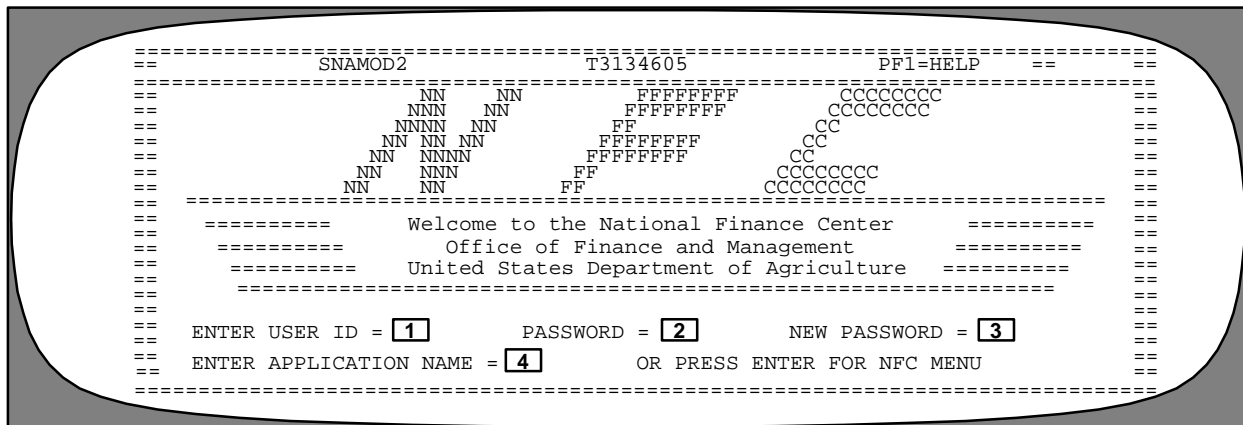
Figure 1. NFC Banner Screen
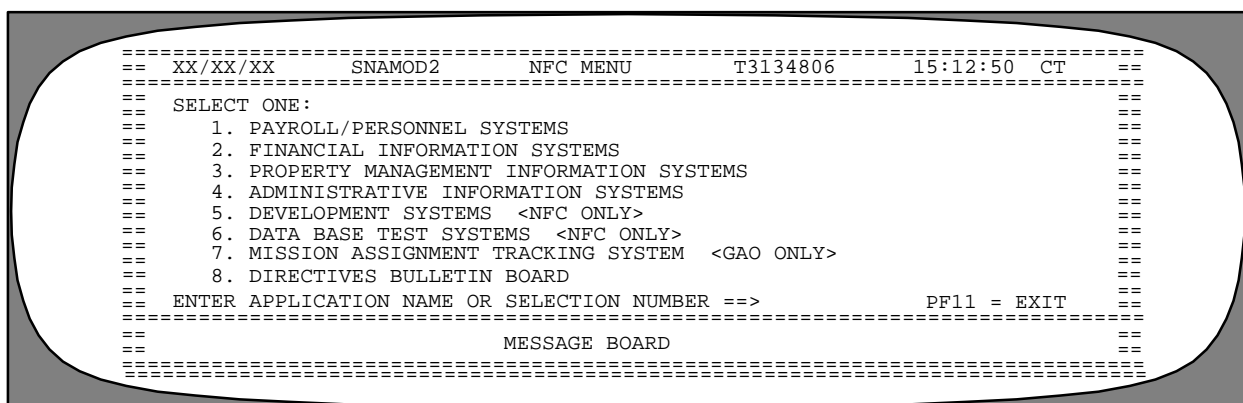
Figure 2. NFC Menu

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Sign-Off

To exit RETM at any time, press [Clear]. The Enter Next Task Code (**Figure 3**) prompt is displayed.

Key in *bye* and press [Enter]. You are now disconnected from RETM but are still connected to the NFC mainframe.

To disconnect from the mainframe, press [PF11] or compatible function key(s). You are returned to the NFC banner screen (**Figure 1**).

To avoid unnecessary charges, disconnect from your telecommunications network immediately once a session is terminated. (See Title VI, Chapter 2, Section 1, Remote Terminal Usage.)
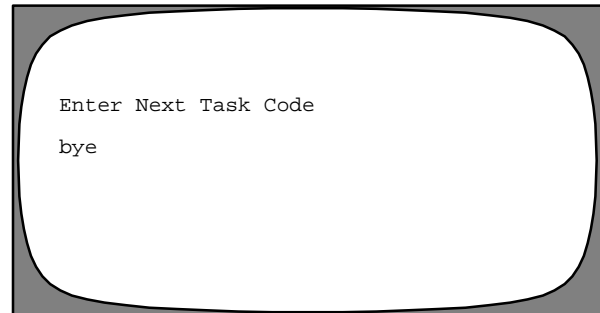
Figure 3. Enter Next Task Code Prompt

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Operating Features

This section describes the system's design and operating features.

System Design

RETM consists of one menu and four options (actions) for maintaining and retrieving data. The key field in each data record is the SSNO field. This field is used to access data for a specific record after the record is entered in the data base.

Help Screen

The Help screen is available for all entry fields displayed on the Report Generation Help Screen. To obtain the Help screen from the Report Generation Screen, position the cursor on the field in question and press [PF5]. The Help screen is displayed and provides a description of the field either in narrative format or by listing the valid entry codes. Press [PF5] to return to the previous screen.
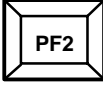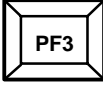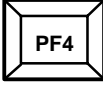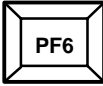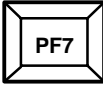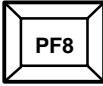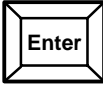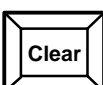
System Edits

RETM performs edit and/or validity checks on entered data, as applicable. If the data does not pass system edits, errors are highlighted, and an error message appears at the bottom of the screen. All errors must be corrected before the record can be updated.

Function Keys

The program function keys are used to access RETM options. How these keys are identified depends on the equipment being used. Other function keys include [Enter] [Clear], and [Tab]. For detailed instructions on your equipment usage, see the appropriate manufacturer's operating guide. The functions of applicable PF keys are displayed at the bottom of each screen.

Function keys used in RETM are as follows:

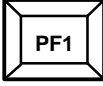| Key	Functions
PF1	Used to return to the RETM menu screen.
PF2	Used to refresh the screen, which clears all data entered on the screen.
PF3	Used to add a tracking record in RETM.
PF4	Used to update a tracking record already established in RETM.
	Used to display the CSRS/FERS Forms Inquiry screen.
PF5	Used to display the Help screen and return to the previous screen.
PF6	Used to submit the command to print the paper version of the Individual Retirement Record, SF–2806 (CSRS)/ SF–3100 (FERS).
PF7	Used to display the previous record stored, if multiple records exist for the same employee.
PF8	Used to display the next record stored, if multiple records exist for the same employee.
Enter	Used to display the next applicable screen from the RETM menu.
	Used to display data for a new record on the inquiry screen.
	Used to submit a report.
Clear	Used to exit the system.
Tab	Used to move the cursor from field to field.

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Agency Tracking Menu

After you have accessed RETM, the Agency Tracking Menu (**Figure 4**) is displayed. This is RETM's main menu and provides four action options.

Following is a brief description of each option:

Update (Add/Mod) (Option **U).** Used to add or modify a tracking record in RETM.

Inquiry (Option **I).** Used to query (view) an existing tracking record in RETM.

Print RETM Card (Option **P).** Used to print the paper version of the Individual Retirement Record, SF–2806/SF–3100.

Reports (Option **R**). Used to generate a report.

Note: To delete a record, contact NFC's Fringe Benefits Processing Unit at 504–255–5332.

To select an option, complete the fields as follows:

 1 **Action Code** *(required, alpha field; 1 position).* Key in the appropriate code: *U*, *I*, *P*, or *R*.

 2 **SSNO** *(required, numeric field; 9 positions).* Key in the employee's social security number.

Press [Enter].

Note: For all RETM screens, the fields displaying zeros (0) are numeric.

Instructions to update (add or modify) a record, query a record, print the Individual Retirement Card and request reports are provided separately in the following pages.

```
    RM00011M           USDA – OFM – NATIONAL FINANCE CENTER
                       RETIREMENT PROCESSING SYSTEM -- RETM
                            AGENCY TRACKING MENU

                              ACTION CODES

                       UPDATE (ADD/MOD) = U
                       INQUIRY          = I
                       PRINT RETM CARD  = P
                       REPORTS          = R


                          PLEASE ENTER:

                       ACTION CODE:
                       SSNO:          000000000




       CLEAR=EXIT   ENTER=NEXT SCREEN
```

Figure 4. Agency Tracking Menu

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Update (Add/Modify)

Update (Add/Modify) is the first option on the Agency Tracking Menu (**Figure 4**). This option is used to add a new tracking record or modify an existing record. To select and use the update option, follow the instructions below.

Adding A Tracking Record. At the Agency Tracking Menu, key in *U* at the Action Code prompt and key in the employee's social security number at the SSNO prompt. Press [Enter]. The Personnel Office – Application Tracking screen (**Figure 5**) is displayed.

Complete the fields as follows:

1 **SSNO** *(numeric field; 9 positions).* This field is system generated from the Agency Tracking Menu screen.

2 **Name** *(alpha field; max. of 41 positions).* This field is system generated.

3 **Agency/POI** *(alphanumeric field; max. of 6 positions).* These fields are system generated.

4 **Separation Date** *(numeric field; 6 positions).* This field is system generated after the separation personnel action is entered into the Personnel Action Processing System (PACT) and applied to the Payroll/Personnel System data base.

5 **Nature of Action** *(numeric field; 3 positions).* This field is system generated after the separation personnel action is entered into PACT and applied to the Payroll/Personnel System data base.

6 **Date Application Received Personnel** *(required, numeric field; 6 positions).* Key in the date the agency personnel office received the employee's application in month/day/year sequence.

7 **Date Application Sent To NFC** *(required, numeric field; 6 positions).* Key in the date the agency personnel office sent the employee's application to NFC in month/day/year sequence.

8 **Select Type Application** *(required, numeric field; 2 positions).* Key in the appropriate type of application being filed, using the list on the screen.

9 **Retirement Coverage Code** *(alphanumeric field; 1 position).* This field is system generated.

After completing all data entry, press [PF3] to add the record to RETM. The message *Retirement Tracking Record Stored* is displayed at the bottom of the screen. To add another record, press [PF2]; otherwise, press the applicable key as displayed at the bottom of the screen.

Modifying A Tracking Record. At the Agency Tracking Menu screen, key in *U* at the Action Code prompt and key in the employee's social security number at the SSNO prompt. Press [Enter]. The Personnel Office – Application Tracking screen is displayed showing the latest data for the selected employee.

Note: The only fields that may be modified are – Date Application Received Personnel and Date Applications Sent To NFC.

To modify the record, key in the new data over the data on the screen in accordance with the entry instructions provided for Adding a Tracking Record. Press [PF4]. The message *Retirement Tracking Record Modified* is displayed at the bottom of the screen.

To modify another tracking record, press [PF2]. The screen is cleared for entry of another social security number.

After completing all modifications, press the applicable key as displayed at the bottom of the screen.


```
RM06010M          U S D A  -  O F M  -  NATIONAL FINANCE CENTER
                    RETIREMENT TRACKING SYSTEM - ADD / MODIFY
                     PERSONNEL OFFICE - APPLICATION TRACKING

SSNO 1  123456789
NAME 2  LAST                     FIRST                   MIDDLE
AGENCY/POI 3  0000      SEPARATION DATE 4 00 00 00    NATURE OF ACTION 5
       DATE APPLICATION RECEIVED PERSONNEL 6 00 00 00
       DATE APPLICATION SENT TO NFC 7      00 00 00

       SELECT TYPE APPLICATION  00 8      RETIREMENT COVERAGE CODE 9
       01 = AGE
       02 = OPTIONAL
       03 = EARLY OPTIONAL
       04 = DISCONTINUED SERVICE
       05 = SEPARATION (NFC USE ONLY)
       06 = PRELIM DISABILITY
       07 = FINAL
       08 = DEATH
       09 = SUPPLEMENTAL (NFC USE ONLY)
       10 = SEPARATION (REFUND)
       11 = ATTACHMENT (NFC USE ONLY)

CLEAR=EXIT PF1=MENU PF2=REFRESH PF3=ADD PF4=MODIFY PF7=PREV REC PF8=NEXT REC
```

Figure 5. Personnel Office – Application Tracking Screen

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Inquiry

Inquiry is the second option on the Agency Tracking Menu (**Figure 4**). This option is used to query (view) tracking records on file for an employee.

To select this option, key in *I* at the Action Code prompt and key in the employee's social security number at the SSNO prompt on the Agency Tracking Menu screen. Press [Enter]. The Application Tracking – Inquiry screen (**Figure 6**) is displayed showing the latest data for the selected social security number.

Note: This screen includes data that was entered not only by agency personnel offices but also by NFC personnel.

NFC enters additional data into RETM to assist agencies in tracking an employee's application. Data entered by NFC on the first inquiry screen includes (1) the employee's current yearly and cumulative deductions while payrolled by NFC, (2) the date the employee's

application was received at NFC, (3) the date the personnel action was applied to the Payroll/Personnel data base, (4) the date the application was sent to OPM, (5) the register number, and (6) the number of days it took to process the action.

●To access additional data on the second inquiry screen, CSRS/FERS Forms – Inquiry screen (**Figure 7**), press [PF4]. Additional data entered by NFC includes the missing forms information.

●To view additional records for the same employee, press [PF8].

●To view a record for another employee, key in the next social security number over the existing number on the first inquiry screen. Press [Enter]. The data for the selected social security number is displayed.

●To view additional records, repeat this process; otherwise, press the applicable key as displayed at the bottom of the screen.

Figure 6. Application Tracking – Inquiry Screen

Figure 7. CSRS/FERS Forms – Inquiry Screen

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Print RETM Card

Print RETM Card is the third option on the Agency Tracking Menu (**Figure 4**). This option is used to print a paper version of the Individual Retirement Record, SF–2806/SF–3100. The Individual Retirement Record can be generated for employees at any time during their employment. A sample of an SF–3100 is provided as **Exhibit 1** to this procedure. NFC generates the *official* Individual Retirement Record (hard copy) that is sent to OPM.

The SF–2806/SF–3100 depicts information regarding retirement contributions. Therefore, time worked by employees under an appointment not contributing to retirement would not be shown on the SF–2806/SF–3100. Also, for departments converting to NFC's Payroll/Personnel System, deductions depicted on the SF–2806/SF–3100 begin at the time of conversion.

USDA agencies that converted to NFC's Payroll/Personnel System have the remarks, Brought Forward, displayed under Fiscal Record on the paper version SF–2806/SF–3100. Brought Forward indicates the employee's previous retirement contributions before conversion.

To select the print option, key in *P* at the Action Code prompt. Press [Enter]. The Print Screen (**Figure 8**) is displayed. If an employee's social security number was entered at the SSNO prompt on the Agency Tracking Menu (**Figure 4**), it is automatically displayed.

Complete the fields as follows:

[1] **Job Character** *(optional, alpha field; 1 position).* *A* is system generated and added to the job name to assist in identifying the printout. Another alpha character (A–Z), however, can be keyed in over the *A*.

[2] **System Output Class** *(alpha field; 1 position). A* is system generated to designate a request for a printed copy. (See Title VI, Systems Access Manual, Chapter 2, Remote Site Usage, Section 2, Interactive System Productivity Facility (ISPF), for additional information on viewing a document.)

[3] **Delivery Info** *(required, alphanumeric field; max of 20 positions).* Key in information to designate where the output job should be delivered (e.g., John Doe, Room 125).

[4] **Remote Printer ID** *(required, alphanumeric; max. of 16 positions).* Key in the number of the printer designated to print the Individual Retirement Record.

[5] **SSNO** *(optional, numeric field; 9 positions).* The social security number entered on the Agency Tracking Menu (**Figure 4**) is automatically displayed. If you want to change the SSNO, type over the existing number. This screen can accommodate 48 social security numbers. Key in additional social security numbers, if applicable.

Press [PF6] to submit the job. The message *JOB NFXXXA Submitted* is displayed at the bottom of the screen. All of the SSNO data fields are cleared and zeros are displayed in preparation of additional entries.

If no other entries are required, press the applicable key as displayed at the bottom of the screen.

```
      RM04050M                    NATIONAL FINANCE CENTER
                        RETIREMENT PROCESSING SYSTEM -- RETM
                                    PRINT SCREEN

                                PRINT INFORMATION
          JOB CHARACTER: A                       SYSTEM OUTPUT CLASS:  A
          DELIVERY INFO:                         REMOTE  PRINTER ID:

            SSNO                 SSNO                 SSNO                 SSNO
          000000000            000000000            000000000            000000000
          000000000            000000000            000000000            000000000
          000000000            000000000            000000000            000000000
          000000000            000000000            000000000            000000000
          000000000            000000000            000000000            000000000
          000000000            000000000            000000000            000000000
          000000000            000000000            000000000            000000000
          000000000            000000000            000000000            000000000
          000000000            000000000            000000000            000000000
          000000000            000000000            000000000            000000000
          000000000            000000000            000000000            000000000


          CLEAR=EXIT   PF1=MENU   PF6=SUBMIT
```

Figure 8. Print Screen

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Reports

Reports is the fourth option on the Agency Tracking Menu (**Figure 4**). This option is used to request any one of three RETM reports.

The Department Summary Report, **Exhibit 2**, lists, by department and agency, the number of processing days between the separation date and the date NFC submitted the application to OPM. This report provides information on annuities, refunds, and deaths.

The Agency/Bureau Summary Report, **Exhibit 3**, lists, by agency (including serviced agencies), the number of processing days between the separation date and the date NFC submitted the application to OPM. This report provides information on annuities, refunds, and deaths.

The Personnel Office Identifier (POI) Summary Report, **Exhibit 4**, lists the separated individuals names within a POI and the number of processing days between the separation date and the date submitted to OPM.

To select this option, key in *R* at the Action Code prompt. Press [Enter.] The Report Generation Screen (**Figure 9**) is displayed.

Complete the fields as follows:

1 **Department** *(required, alpha field; 2 positions)*. Key in the department code.

2 **Agency/Bureau** *(required, alphanumeric field; 2 positions)*. Key in the agency or bureau code.

3 **POI** *(optional for Report Nos. 1 and 2, required for Report No. 3, numeric field; 4 positions)*. Key in the personnel office identifier code.

4 **Time Period** *(required, numeric field; 6 positions)*. Key in the beginning date of the report in month, day, year sequence.

5 **To** *(required, numeric field; 6 positions)*. Key in the ending date of the report in month, day year sequence.

6 **Select Report No.** *(required, numeric field; 1 position)*. Key in the desired report number.

7 **Delivery Information** *(required, alphanumeric field; max. of 20 positions)*. Key in information to designate where the generated report should be delivered (e.g., John Doe, Room 125).

8 **Remote Printer ID** *(required, alphanumeric field; max of 16 positions)*. Key in the number of the printer designated to print the report.

9 **System Output Class** *(optional, alpha field; 1 position)*. **A** is system generated to designate a printed report. For additional information on viewing a document, see Title VI, Systems Access Manual, Chapter 2, Remote Site Usage, Section 2, Interactive System Productivity Facility (ISPF).

10 **No. Of Copies** *(required, numeric field; 1 position)*. Key in the number of copies desired.

Press [Enter]. The message *Job Submitted* is displayed at the bottom of the screen. To request additional reports, key in the new data over the existing data and press [Enter].

If no other entries are required, press the applicable key as displayed at the bottom of the screen.

For assistance in completing these fields, move to the field in question and press [PF5] to display the Report Generation Help Screen (**Figure 10**).

```
  RM04100M              U S D A, O F M, NATIONAL FINANCE CENTER        08/04/00
                              REPORT GENERATION SCREEN

         DEPARTMENT:          AGENCY/BUREAU:              POI:

                   TIME PERIOD   000000      TO    000000

                     1.   DEPARTMENT SUMMARY REPORT

                     2.   AGENCY/BUREAU SUMMARY REPORT

                     3.   POI SUMMARY REPORT

                     SELECT REPORT NO.


   DELIVERY INFORMATION:                        NUMBER OF COPIES: 1
   SYSTEM OUTPUT CLASS : A                    REMOTE PRINTER ID:


      CLEAR=EXIT    PF1=MENU  PF5=HELP    ENTER=SUBMIT JOB
```

Figure 9. Report Generation Screen

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```
RM04101M                U S D A. O F M. NATIONAL FINANCE CENTER        XX/XX/XX
                              REPORT GENERATION HELP SCREEN

DEPARTMENT       -   ENTER YOUR TWO POSITION DEPARTMENT CODE
AGENCY/BUREAU -      ENTER YOUR TWO POSITION AGENCY/BUREAU CODE
POI              -   ENTER 4 DIGIT PERSONNEL OFFICE IDENTIFIER CODE
TIME PERIOD      -   ENTER THE BEGINNING AND ENDING DATES OF THE TIME PERIOD
                     THAT YOU WISH THE REPORT TO COVER.    DATES MUST BE IN MMDDYY
                     FORMAT.
SELECT REPORT NO. - ENTER 1, 2 OR 3 BASED ON WHICH REPORT YOU WANT PRINTED.
               1 - SUMMARY LIST BY DEPARTMENT THE NUMBER OF PROCESSING DAYS
               2 - SUMMARY LIST BY AGENCY THE NUMBER OF PROCESSING DAYS
               3 - SSNO LISTING OF EACH ACTION PROCESSED WITHIN A SPECIFIC POI
DELIVERY INFORMATION -   ENTER IDENTIFYING INFORMATION NEEDED TO DELIVER REPORT
                         TO YOUR LOCATION.
REMOTE PRINTER ID    -   ENTER YOUR REMOTE PRINTER ID.
SYSTEM OUTPUT CLASS  -   ENTER A IF REPORT SHOULD BE PRINTED AUTOMATICALLY. IF
                         YOU DESIRE TO VIEW REPORT FIRST REFER TO TITLE VI,
                         SYSTEMS ACCESS MANUAL. CHAPTER 2. SECTION 2.
NUMBER OF COPIES     -   ENTER NUMBER OF COPIES DESIRED. MAXIMUM IS 9.

     CLEAR=EXIT                  PF5=PREVIOUS SCREEN
```

Figure 10. Report Generation Help Screen

Reporting Through FOCUS. RETM is defined to the FOCUS Reporting System. For detailed instructions on accessing FOCUS, see Title VI, Systems Access Manual, Chapter 5, Report Generator Systems, Section 4, FOCUS Reporting System.

To retrieve RETM data, select the option for the Retirement Processing System (RETM) on the Payroll/Personnel Data Base Menu within the FOCUS Reporting System.

Two files are available in the FOCUS Reporting System for RETM. RETCLAIM contains information on employees, monies, personnel actions, military records, and remarks codes. RETMASTER contains information on claimants, forms, tracking, and missing documents.

To obtain a list of the FOCUS element names used for ad hoc reporting for the RETCLAIM and RETMASTR files, refer to Title VI, Systems Access Manual, Chapter 5, Report Generator System, Section 4, FOCUS Reporting System, Bulletin No. 87–1, FOCUS Listings Print Utility for instructions.

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**Payroll/Personnel Manual
Retirement Procedures
Retirement Processing System**

(reserved)

Payroll/Personnel Manual
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Exhibit 1

Sample Of Individual Retirement Record SF–3100 (Paper Version)

INQUIRY – SE3100   CARD   1

NAME: LAST DOE   FIRST JOHN   MIDDLE T   DOB 01 02 35   SSNO 123 45 6789   AGCY USDA   PAY OFC NFC   LOCATION N.O. LA.   PAY OFC NO 12-40-0001

XX-XXXX

SERVICE HISTORY

EFFECT DATE	ACTION	BASE PAY	REMARKS
3/29/87	TRANS CAREER	18358.00	GS-07
4/12/87	REASSGNMENT	18358.00	GS-07
4/12/87	PAY ADJ	18970.00	GS-07
4/12/87	CORRECTION	18970.00	GS-07
10/25/87	PAY ADJ REASSGNMENT	18358.00	GS-07
11/08/87	CHG IN SCD	18358.00	GS-07
11/21/87	TERM-APT IN	18358.00	GS-07

FISCAL RECORD

YEAR	CAL SAL	YR DED	ACCUM SAL DED	REMARKS
1987	159.41		159.41	DED. BEGAN
1988	.00		159.41	3/29/87
1989	.00		159.41	SCD 01/05/85
1990	.00		159.41	PAY CEASED
1991	.00		159.41	0/00/00 NO UNUSED

DEDUCTIONS AND SERVICE   S/L BALANCE
CERTIFIED CORRECT

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Exhibit 2

Sample Of Department Summary Report

DEPARTMENT SUMMARY REPORT RETIREMENT PROCESSING FOR PERIOD			PAGE 1		
XX XX XX THROUGH XX XX XX (DEPARTMENT WIDE)					
NUMBER OF DAYS BETWEEN SEPARATION DATE AND SUBMISSION TO OPM, BOYERS					
	0 – 28	29 – 58	OVER 58	TOTAL	
AMS (02)	11	2	0	13	
ANNUITIES	11	0	0	11	
REFUNDS	0	1	0	1	
DEATHS	0	1	0	1	
ARS (03)	26	2	0	28	
ANNUITIES	25	0	0	25	
REFUNDS	0	1	0	1	
DEATHS	1	1	0	2	
ASCS (05)	9	1	0	10	
ANNUITIES	9	0	0	9	
REFUNDS	0	0	0	0	
DEATHS	0	1	0	1	
FMHA (07)	32	0	0	32	
ANNUITIES	24	0	0	24	
REFUNDS	4	0	0	4	
DEATHS	4	0	0	4	

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Exhibit 3

Sample Of Agency/Bureau Summary Report

AGENCY/BUREAU SUMMARY REPORT				
RETIREMENT PROCESSING FOR PERIOD		PAGE 1		
XX XX XX THROUGH XX XX XX				
(AGENCY WIDE)				
NUMBER OF DAYS BETWEEN SEPARATION DATE AND				
SUBMISSION TO OPM, BOYERS				
	0 – 28	29 – 58	OVER 58	TOTAL
5026	3	0	0	3
ANNUITIES	2	0	0	2
REFUNDS	1	0	0	1
DEATHS	0	0	0	0
5027	1	0	0	1
ANNUITIES	1	0	0	1
REFUNDS	0	0	0	0
DEATHS	0	0	0	0
5029	1	0	0	1
ANNUITIES	1	0	0	1
REFUNDS	0	0	0	0
DEATHS	0	0	0	0

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Exhibit 4

Sample Of Personnel Office Identifier (POI) Summary Report

				NO OF DAYS		
				POI SUMMARY REPORT		
			RETIREMENT PROCESSING FOR PERIOD		PAGE 1	
			XX XX XX THROUGH XX XX XX			
			(POI 1531)			
EMPLOYEE NAME	AG	SOC. SEC. NO.	TYPE APPLICATION	BETWEEN SEP. AND SUB. TO OPM		
DOE, JANE	52	000112222	02	19		
DOE, JOHN	53	000223333	06	19		
SMITH, JANE	54	000334444	04	13		

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Exhibit 5
Page 1

RETM Edit Messages

Message

Agency Code Must Be Entered

Bad Find On Claimant Record

Bad Obtain On Forms–Rcd

Control–Error On Table Search

Data Base Exception For Tables

Date Appl Mailed NFC Is A Required Field

Date Appl Recd Personnel Must Be A Valid Date

Date Sent to NFC Must Be Later Than Or Equal To Date Received Personnel

Department Code And Agency Code Do Not Agree

Dup Rec Exhausted

Employee Last Name Cannot Be Spaces

End Date Must Be MM/DD/YY Format

Enter SSNO For Next Request

Invalid Agency Code Entered

Invalid Key – Validate Agcy Code/POI

Job Submitted

Key In New SSNO, Press Enter

Modify Allowed On "Date Appl/Rcvd Per" & "Date Appl/Sent to NFC" After Init Input

Modify Not Allowed, Claim Has Been Processed And Forwarded To OPM

Modify Not Allowed, Type Application Of "5", "9", And "11" Are For NFC Use Only

Must Enter Delivery Information

Must Enter Job Character

Must Enter Remote Printer ID

Must Enter System Output Class

Must Press PF2 To Refresh Screen, Then PF3 To Store A New Tracking Record

Pers Off Ident Must Be Numeric

Please Enter An Agency Code

Press PF3 To Store New Tracking Record

Problem With Accessing Tracking Record – Contact Information Center – NFC

Problem With Transfer Back To Main Menu

Record Inactive – Error On Table Search

Report No. Must Be 1, 2, Or 3

Retirement Tracking Record Modified

Retirement Tracking Record Stored

Start Date Must Be MM/DD/YY Format

SSNO Must Be All Numeric

SSNO Not Within Your Security Access

SSNO Required

POI Is A Required Numeric Field

Table Error – Request Not Complete

There Are More Than 12 Forms Missing For This SSNO – Only 12 Displayed On Screen

Tracking Record Does Not Exist For This SSNO

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Exhibit 5
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RETM Edit Messages *(cont'd)*

Message
Unable To Modify, NOA And Eff Date Duplicate
Unable To Modify Retirement Tracking Record
Unable To Obtain Claimant Record
Unable To Obtain Current Tracking Record
Unable To Store, Record Exists With Same Separation Date And Nature Of Action
Unable To Store Retirement Tracking Record
Valid Values For Employee Name Are Letters A Thru Z (i.e., Commas Not Allowed)
Valid Values for System Output Class Are A And X
Valid Values For Type Application Are 1, 2, 3, 4, 6, 7, 8, 10
Valid Values For Type Retirement Coverage Are "F" And "C"
Validate Selection Or Action Code

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